Onboarding
Primer

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INTRODUCTION

COVID-19. The Great Resignation. Quiet Quitting. Inflation. Labor Shortages.

Let's face it—the workplace and the workforce have been through some tumultuous times in the past few years. More likely than not, your organization has seen a lot of changes. But not all change is necessarily bad; change is also transformation. An opportunity for reflection and even growth.

Companies have slowed hiring in search of the "perfect" candidate before making hiring decisions. Caution is a good thing, but it can also slow down production and operations when roles sit empty. Selecting the right person is great, but what are you doing with them once they are hired? The first few days, weeks, and months are a pivotal time for new hires. They are deciding whether or not to stay. It is up to you to make them want to stay.

Onboarding is your organization's chance to make a great impression. Recruiting is the first, but it doesn't stop once they have accepted the offer. The entire organization is now on display. What does that look like?

If your organization doesn't have a structured onboarding program already, it is not too late! It is entirely possible to create a successful, engaging, and FUN onboarding program that increases new hire engagement and retention.

Learning and development teams are often focused on immediate requests and fighting fires that may or not be extinguished with training. L&D professionals can be more than order-takers. They have the knowledge and skills to bring a great onboarding experience to life. Use them to augment human resources efforts and consider expanding from onboarding to reboarding to everboarding.

Here are the 10 approaches to consider for a great onboarding program.

—Dr. Tara Roberson-Moore

TOP 10 TIPS

Top 10 Tips for Creating a Successful Onboarding Experience

April 14, 2023

I have never experienced a formal onboarding program. Not one. And I am old, so there have been several jobs—corporate, government, consulting, etc.

The closest I came to it was when I worked for a major university. They had an "orientation" for everyone who had been recently hired (for me, "recent" was nearly six months) and it focused exclusively on benefits and culture and was not audience specific.

In fact, because they hired hourly employees more often than salaried employees like me, most of the presentation focused on those positions. It was a half-day, in-person event. We left with packets and t-shirts and were sent back to work. That was it. What about my specific department? Again, nothing. I was assigned a person to take my questions to, and that was it.

Now, I am the type of person who does not like to waste time and I was at a place in my career where I could apply my experience and figure it out, but not everyone is comfortable doing that. So, what about them?

Did you know that 2.5% of workers switched jobs each month from January to March in 2022? (Pew, 2022)

When the math is done (by someone else), this is an annual turnover rate of 30%. Most of them reported they had a new job within a month. That is a lot of new employees out there that need onboarding.

Did you know that 69% of employees say they are likely to stay with a company for a least three years after a great onboarding experience? (O.C.Tanner, 2018)

In many instances, onboarding is expected to be handled by human resources. There is absolutely nothing wrong with that but unless they are also training experts, a lot of companies could be missing an opportunity to create something special. Letting training and development experts augment HR can result in an onboarding program that provides the experience new employees need to get comfy.

Here are 10 things you can do to make your onboarding program a learner experience that will provide the anchor newbies need to stick around.

1. Analysis

<*grabs soap box, climbs on*> If you want to know what your onboarding program should look like, ask. Onboarding, when approached as a learning initiative, should start like all large-scale L&D initiatives. I have preached about this before so I won't stand up here long, but *conduct a full-scale, deep-dive needs analysis*. Don't just talk to managers and supervisors—talk to recently hired employees and ask them what would have been helpful to them as they came onboard. An onboarding analysis should not be rushed or skimmed. This is not developing one training event, it is an experience. <*steps off soap box, puts it away for now*>

2. It's a journey—not an event

Onboarding is not a one-and-done. New hires have a lot of stuff to learn about a new company—the position, their tasks, the social system, where the bathrooms are located, what to do when their computer doesn't work. They cannot absorb all the information in a one-time event. And I hate to be the one to tell you, but hiring people and "handing them over" to training for the first few weeks with an expectation they are going to come back fully trained and ready to go is not going to work.

Did you know that new hires in companies with longer onboarding programs report being more proficient in their roles four months sooner than in companies with short onboarding programs? (O.C. Tanner, 2018)

How long an onboarding experience should be depends on what you find in the analysis. What is the typical ramp-up expectation for the position? That is a factor for the skills-based, role-specific training needs, but the initial training is one thing. What are you going to do to support that knowledge in the long term to ensure the employee can get the reinforcement they need, when they need it? I noticed it is being referred to as "everboarding" and I like that.

3. Getting personal

Onboarding is not one-and-done and it is also not one-size-fits-all. Your analysis will tell you who the audiences are and the unique info each one needs.

Did you know that 91% of employees want personalized, relevant training? (Lorman, 2021)

Before your head explodes from the way this sounds, it is not about designing a new program for each person. It is about developing materials that, when arranged into a training path, can meet the needs of individuals while still covering the overall needs of the company.

4. Mentors/onboarding buddies

Call them whatever you want, but call them something!

Did you know that 87% of organizations that assigned a mentor to a new employee during onboarding reported increases in the efficiency of new hires? (Techjury, 2023)

Again, analysis will tell you whether your company has the capacity to support this approach. I would say that if you are going to recommend new hires "ask co-workers" questions, you might as well formalize it so you can measure success. This is a two-part task. You are not just concentrating on what the new hires need to know. You will also have to do some prep to find and develop the right mentors. Sorry, but "voluntelling" someone to do it is not what will work here.

5. Variety is the spice of life

It is also true in the workplace. I am begging you not to stick new employees in a training room (virtual or actual) for six or seven hours a day listening to instructor-led training for several weeks. Just reading that sentence makes my eyes bleed. Imagine what it is doing to those trainees?

Did you know that people are 95% more likely to recall knowledge delivered via video than text alone? (PopVideo, 2016)

We all know engagement is one of the keys to learning, so offer a variety of training modalities, events, and opportunities for new employees.

6. Reinforcement

Remember what I wrote about one-and-done? You don't? Maybe you need some reinforcement?

Did you know that people forget about 50% of information presented to them in the first hour; 90% within a week? (Learning Guild, 2014)

I would hypothesize that under the stress of "new employee," the stats are worse for these audiences. This is where your variety of modalities, mentors, and technology can boost your reinforcement efforts.

7. Metrics and benchmarks

New employees should have their own set of metrics and benchmarks.

Did you know that 60% of companies indicate that they do not set any milestones or concrete goals for new hires to attain? (*Harvard Business Review,* 2018)

New hires should not be expected to perform at the same level as experienced employees. These metrics should also not be a secret. Another note here: people acting as mentors or onboarding buddies should also have adjusted performance metrics while they are assigned to assist someone.

8. Buy-in and support

Did you know that 70% of change efforts fail? (Growth Engineering, 2022).

L&D programs like onboarding are change and with a stat like this and the effort required for onboarding, support must be top-down.

Onboarding experiences are long-term. Standing up an onboarding program is not cheap and it can also take time. Buy-in really needs to be obtained, for the most part, before you even start analyzing the needs. As mentioned, this is a large analysis project, so just looking into the needs can take time and money. When you wrap company-level needs like culture, mission, and strategy into role-based skills training needs, onboarding development projects can also result in a lot of deliverables, so get buy-in before you start.

9. Fun

Are you sitting down? There is absolutely nothing wrong with adding some fun in training! Can we all agree to relax a bit? People have been through some stuff for the last few years. What is unique and cool about your workplace? Show it off! Showcase the good stuff and prepare people to deal with the not-so-good stuff. Use these unique and cool things to create engaging opportunities throughout the onboarding experience.

Did you know that learners are 20 times more likely to remember facts and figures if they're part of a story? (*Harvard Business Publishing*, 2017)

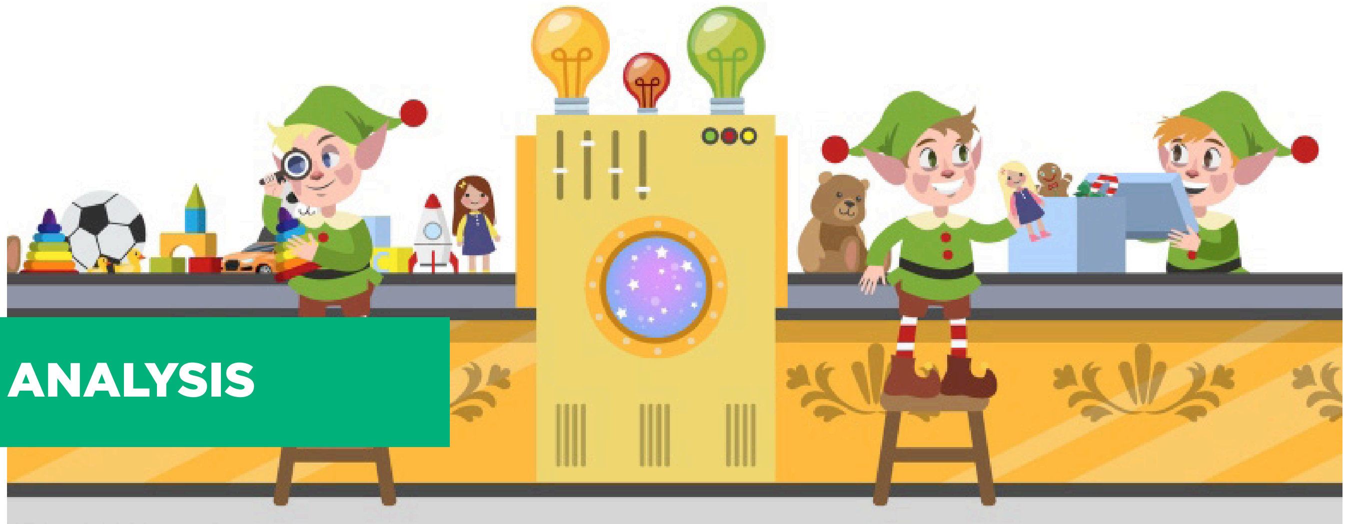
Yes, there are serious business tasks to learn but presenting that training wrapped in a fun story or as a game can actually increase retention of learning.

10. Clarity

Remember my story at the top about no onboarding? Remember the stats mentioned above about metrics? Don't leave your new hires in the same place. Like providing rubrics for students in a school classroom, the metrics don't have to be a secret. And they shouldn't be. Providing a clear picture of expectations (keep them realistic) and how those are measured makes learners (new hires) feel confident about where they are and where they are going. On the flip side, they allow managers and supervisors to support and assist new employees in getting up to speed.

We will take a closer look at each one, dive deeper, and offer some practical approaches to a successful onboarding program.

> "Letting training and development experts augment HR can result in an onboarding program that provides the experience new employees need to get comfy."



ANALYSIS

Analyze This

April 27, 2023

I have written about the importance of analysis. I have reinforced that information in a couple of other posts. Some of you are still not convinced.

<RETRIEVES SOAP BOX> So! Let's try a story. (20x more likely to remember!)

Once upon a time, there was a fancy prince who wanted to implement an onboarding program for the staff in his castle. He enlisted the help of some learning and development elves he found in the internet forest.

After conducting an initial intake (yes, they do an intake before they start making cookies and repairing shoes), the elves gathered together and recommended the prince perform a needs analysis to identify gaps, define scope, etc.

"I have already done an analysis," he said. "I know what they need to do, and I want to start at development."

The woods turned dark; thunder clapped from the heavens; the evil queen laughed (there HAS to be an evil queen), but the elves said "ok" and went to work.

Fast-forward three months: the project is delayed because the prince could not free up the castle SMEs needed to confer with the elves. This resulted in many missed discovery meeting and review deadlines. And when the prince was finally able to commit staff to review, it turned out the prince did not know much about the jobs of the castle staff. He knew the results, but alas, not the tasks themselves.

Ultimately, the prince had to ask the elves to re-do SIX eLearnings with a change order that was almost double what the analysis would have cost to do at the start.

No one is living happily ever after, except maybe the evil queen.

Onboarding is a program. It is not one training event. It is also usually not one development event either—I have seen onboarding programs built in one full development phase and I have seen onboarding programs divided into several development phases (costs are one factor, but project fatigue is also a factor). Due to the sheer size of a long-term initiative like onboarding, getting everything in place before development begins is imperative to success.

Analysis results in a plan. As we have mentioned before, you get the blueprint of the house—not the house. Remember, not even paint colors are being picked yet!

If you are thinking about creating an onboarding program, whether on your own or working with a really cool and fun troupe of elves, start by asking questions:

Audience

- How many audiences are there?
- What do they ALL need to know?
- What do they EACH need to know?

- Where are these people located?
- Are there performance metrics? (Are they based on the job description? Is the job description current?)
- Are there SMEs for EACH of the audiences?
- Do these positions have existing career tracks or progressions for upskilling to advanced levels (like I, II, III)?

Scope

- What is the expected ramp-up time for each audience?
- What kind of training modalities have worked well in the past?
- Can you support a long-term onboarding program?
- Can you support individualized training paths?
- Do you want a peer-learning, mentor, onboarding buddy program included?
- Can you support it?
- What technology is already in place?
- Is there new tech you are interested in?
- Do you want this program to encompass the "orientation" information in conjunction with human resources needs like benefits, compliance, culture, etc.?

Skills (for each audience)

- What systems do new hires **need to know** how to use?
- What is the expected ramp-up time for each system for a new hire?
- Are there sandboxes in those systems?

- What skills do new hires **need to perform** in the first 30 days? 60 days? 90 days? 6 months? 9 months? First year?
- How difficult are these things to learn?
- How often will they perform these tasks?
(Both of these go to how much reinforcement may be needed)
- What exercises would be the most valuable for new hires?
- What are the most common points of failure for newbies?
- What are the expected outcomes for those who are being onboarded at 30 days, etc.?
- If the HR stuff is included in the scope, what is common to ALL audiences? What is exclusive for each?
- Are there safety and compliance training requirements?
- Are there requirements about the timing of this information?
If you opt for mentors or buddies, what type of training do they need?
- What do managers and leaders already have?
- Is there an incentive program for participating?
- What performance metrics are there for people who are also acting as mentors?

Modalities

- Is there an LMS?
- Which one?
- How is it currently used?
- How important is mobile learning capability?

- What type of tech is available in instructor-led classrooms?
- What virtual platform is currently used for virtual training?
- Do learners in each of these audiences have the tools they need to access eLearning, electronic workbooks, etc.?
- Some people don't work on computers all day, every day! Is there an interest in job-shadowing or reverse-shadowing?
- Are there any safety restrictions you need to plan for?

Timing

- Will new hires be assigned work tasks while onboarding?
- How long is a typical training day for ILT/VILT?
- Referring to the skills items above: When in their career track do they actually NEED the information?
- If they are not going to work in a particular system for the first three months, do not send them to train until they need to or you will have to do it over!

Now, I don't want to leave you with the impression that analysis meetings are just elves peppering people with questions under a blinding light like a police interrogation. There are questions, but the conversations and descriptions provided by SMEs really drive the direction. In the end, we elves are making sure we get these answers. If the conversation does not naturally go there—we ask.

Tara's Tips for Onboarding Analysis

1. If there is more than one audience, hold separate meetings for each group—even if it is just one SME for each.

2. Ask for newer employees to attend the SME meetings for their audience. No offense to managers and stakeholders but if you have not been "new" for a while, you have forgotten what you wished you knew when you started!

3. Be prepared for every meeting. Ask for job descriptions and performance metrics for the intended audiences ASAP and review them before the first meeting with SMEs.

4. Facilitate the conversations. Create a safe space to speak up. Ask those who are being quiet (because maybe they are newer!) their thoughts on the discussion.

5. Be prepared with questions (wink, wink) to keep conversations moving.

6. If you don't need a meeting—don't have one. SMEs are typically being pulled off their regular jobs to assist, so be mindful!

7. If SMEs disagree on something, escalate it to the stakeholders. Let them break the tie if you can't get consensus.

8. Keep grounding your SMEs in the high-level analysis. They are going to try to tell you EVERYTHING about EVERYTHING. That is not what we elves need right now. We will dive even deeper as development starts—get specifics on processes, etc.

9. Ask for things. If someone has a note on their desk they use "all the time" to work through something, ask if you can have a copy. You may not need it now, but this stuff is development GOLD.

10. If it ain't broke, don't mess with it. If there is an existing training asset that can be used as part of the new onboarding program—USE IT. Weave it into the overall plan. It saves money and time in the long run!

The Blueprint

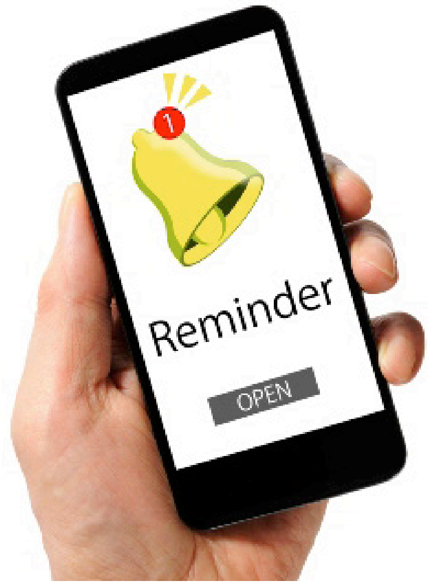
My analysis projects always result in a list of proposed deliverables for each audience that provides the proposed courses, supporting materials for those courses, proposed seat time of each training deliverable, high-level learning objectives for each deliverable, and pricing.

Customers also get a program guide that describes the onboarding experience, lays out proposed or suggested learning paths/journey maps for each audience, and timing suggestions. All this ties to the spreadsheet of deliverables.

And those two things make up the plan for your onboarding house.

> Analysis results in a plan.

IT'S A JOURNEY



One-and-Done Is Just Not a Thing

July 7, 2023

Remember when we talked about metrics and benchmarks? You don't? Do you remember what we said about how onboarding should contain a variety of modalities?

I get it, you read them and moved on. But what if you really needed to retain the information about metrics (and you do!) and why they are important? How much more would you remember right now if you had gotten perhaps one email per week that reminded you of some aspect of that article? What if you received a text that linked to additional resources or even better, an internal space where you can access the information on-demand?

Did you know that people forget about 50% of information presented to them in the first hour; an average of 90% within a week? (Learning Guild, 2014)

I would even hypothesize that under the stress of the label "New Employee" that the stats are worse for these audiences. This is especially true if your program tries to cram every last bit of information into the new person's brain in a day or a week.

So, how do you fix it?

Well, you can't really "fix" it. It is brain science. That is a whole bunch of other articles and books.

You can, however, plan for all the forgetting and find ways to keep important information in your learners' brains as long as possible. This is where all that variety we talked about comes into play, as well as mentors or onboarding buddies.

Repetition! It's not just for kids

Did you know that 80% of workers report it's important to receive regular, frequent training so they don't forget the information? (Axonify, 2018)

When you hear about teaching kids, you hear a lot of repetition, repetition, repetition. This is because kids are different than adults. They typically don't have a lot of pre-existing information or knowledge. So, there is a lot more memorization and learning-by-repetition.

For adults in the workforce who are most likely being taught a new work task, the key to really catching on is immediate application of what they learned. Whether this is through practice labs or on-the-job—use it or lose it is real.

So, if the learners know they are going to forget—and we all know they are going to forget—then why aren't we doing something about it?

Pro tips for maximum remembering

Timing. One of the things we talk about constantly in this business is timing of training. If you train someone on a task that they are not going to be expected to do for two years, training them on it the first week is a huge waste of resources. And this is not just about onboarding, this applies to any job. If your adult learner is not going to be performing the expected task within a few days of training, you are probably going to have to retrain them when they do encounter this task.

KISS. Keep It Simple, Silly. Just as timing impacts transfer, so too does the amount of information you pile on a newcomer. Downloading the entire company SharePoint into a newbie's brain in the first couple of days is not going to do it. Chunked, targeted learning options that are accessible on-demand are a great way to not just provide the first iteration of the information, they also provide a great chance for learners to go back when they need it.

Reinforcement. Also known as spaced repetition in some circles, is a resource you can count on when applied with thought and planning. These are thoughtfully scheduled opportunities to call out specific important points, locations of resources, or other information that offers a reminder to a learner about a specific task they learned.

Reinforcement for reinforcement

STOP. Do not create a group chat and start sending out random pieces of info.

Reinforcement, like all other things in effective learning, requires some planning. All the things that apply to increasing retention (timing, KISS) also apply here. Reinforcement should not become noise.

Add reinforcement to your analysis overall and your task-level inquiries. Ask some of these questions:

- How difficult is the task?'
- How important is this task?
- How often does the learner perform it on the job?

Do you recognize the DIF Model? Difficulty. Importance. Frequency. Each one has criteria for ranking it high and low, and for a couple there is a "medium" choice. Now, the step-by-step way to do this is to look at every learning objective and ask these three questions of your SMEs. There is a matrix that shows you when the answers to these three questions are answered, you will have an idea of the "DIF" of that task. It will be either high, medium, or low.

Any task that is ranked as highly difficult and not completed frequently needs more training. Read it again. It is awkward but true.

Remember repetition from earlier in the article? If someone takes new skills back to their desk from training and immediately starts performing a task that they are going to be doing daily—they are reinforcing what they just learned without any help from you. The best thing you can reinforce for your people in this instance is reminders of where to find help or resources if they need it.

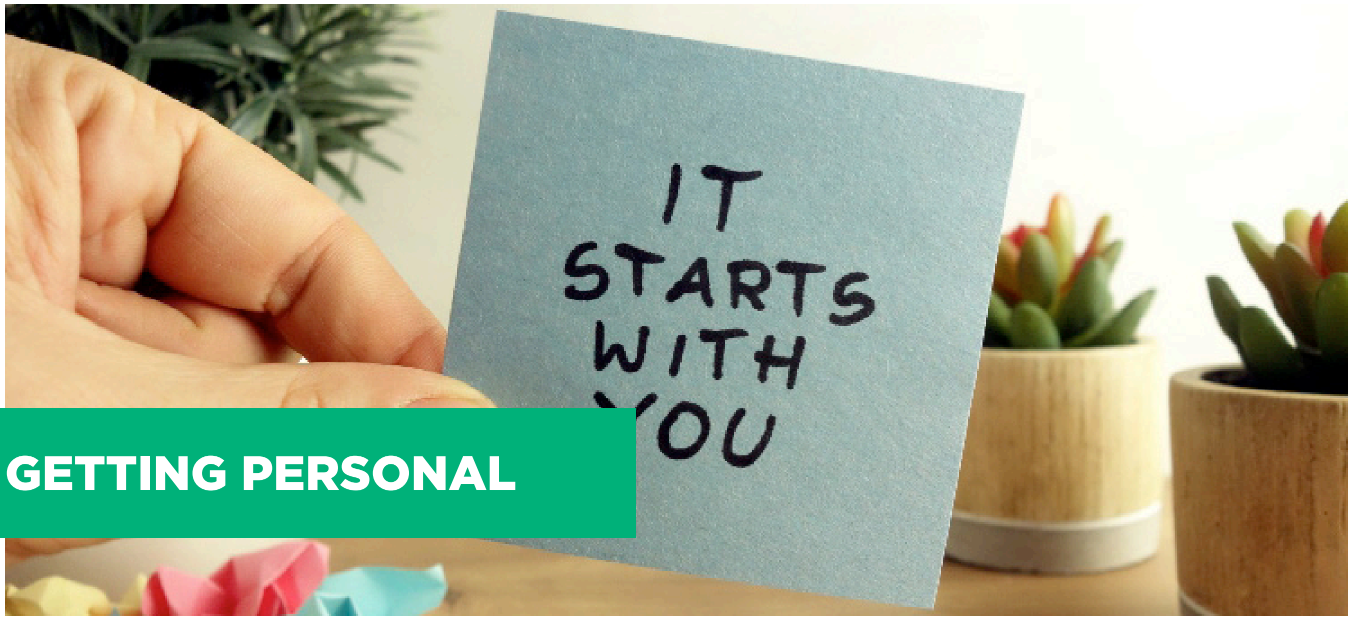
But what about the tasks that are done monthly? Quarterly? Annually? These are great things to reinforce. In these instances, timing of the reinforcement event is key.

For example, if annual reports are due January 15 and you know people always wait until December to start them, release reinforcement events throughout the month of December. These will not only reinforce the info, but it also works as a reminder. (We love a two-fer!)

Metrics

Want to find out if existing programs need reinforcement? If you set up metrics, you should have some data that indicates pain points. Not gathering metrics? Talk to supervisors, talk to learners, look at any performance reports, etc. you can find. Maybe a new training module rolled out for a specific task a few months ago, but everyone seems to mess up step 5 of the process. Make a quick refresher video. You don't need high-production or fancy interactions. Make it part of the reinforcement schedule.

There are lots of ways to approach reinforcement activities. Talk to your LMS people. Find out what you can and cannot do with the technology. Automate things that can be automated. Only reinforce things that REALLY need it. You have heard or seen the phrase: "If everything is important, nothing is important." Failure to plan what reinforcement looks like can result in a whole lot of nothing.



GETTING PERSONAL

Let's Get Personal

May 17, 2023

Tomorrow is Margot's first day at a new job! They are super excited about the opportunity but would usually be super anxious about The First Day At The New Job. Margot does a quick mental check and finds that they are not as anxious as expected.

Margot hasn't even officially started yet and they have already received a welcome package full of swag from the new employer, a cool welcome video about the company, an email from their new supervisor, and an itinerary for the first day.

Margot is joining the company as a hybrid employee: two days in the office and three days at home. For the first day, they are reporting to the office. All the celebration around their arrival has really eased some of the anxiety.

Margot's welcome email included a video tour of the office with 360-degree interactions that allowed them to wander around the office—no asking where the bathroom is! They also got detailed information on where to park, where to enter the building, who to meet up with, and verification of dates and times. And while Margot is sure there is going to be some paperwork to take care *of, they were thrilled to see that the first day also includes a team lunch, some one-on-one meetings with their new supervisor and his managers—sort of scary, but cool they are involved.*

There are a couple of short training sessions—some short eLearnings about security and safety, but most importantly, Margot gets to meet their onboarding buddy. Margot has never had that experience before. As it was explained during the hiring process, this person is Margot's main contact—a resource of information, someone to answer questions, and someone who will help Margot be successful.

Margot is not new to the field, but has not done the work for this specific company. They know the overarching theory will probably be applicable, but the actual tactical approaches may be different. Margot was told that they would get a personalized training experience during onboarding and the career progression opportunities within the company.

Margot is excited about the prospect of talking about not just this current position, but how they might grow within the company. Changing jobs is a pain. What if they can really stay with this organization for a long time?

Audiences

When analyzing an onboarding program <a-hem> it is important to talk about role-specific tasks and performance expectations, of course, but before you get there, it is imperative to talk about all the different types of people who might be hired to fill those roles:

- External hires with no experience in the workforce, this company, or the role itself
- External hires with experience in the workforce, but not with this company or this role
- External hires with experience in the workforce and role experience, but not with this company

- Internal hires who have upskilled to a new level in the career progression
- Internal hires who have experience with this company, but not this department or this role

Which type of experience would each of these audiences require? Onboarding? Reboarding? Everboarding?

So, ask the question: "Who typically fills this position?"

More advanced positions may be restricted to internal hires or promotions, or specific level progressions. This person may need a "reboarding" experience. This is the perfect time to provide these folks with administrative information that has changed since they started with the company. Perhaps there have been updated culture items that were rolled out to existing employees, but this is a chance to reinforce and remind them. They need some of the same information your new folks need, but not all of it.

Some people who are hired will be brand new to the workforce. This position may be their first full-time job. What do you want to them to learn? This is your chance to "raise 'em right."

Also ask questions about how often these positions are open and how many people are usually hired at a time. Think about positions that often hire cohorts, like a call center or part-time positions. That is a different experience from the one Level 3 Widget Maker the company hires every three years.

Modularized learning options

Develop for the needs of all the audiences and then use them to meet the needs of individuals.

Read it again. I know it sounds like a lot. It is. It would be professionally irresponsible for me to not be transparent about that. But stick with me, I will offer you some tips to make it more manageable.

Think of it like a pyramid you are building from the bottom. There is information all new hires need regardless of where they come from and where they fit into the audiences listed above. This includes all the HR paperwork that goes with starting a new job or new position. This also includes culture, history, safety, compliance, etc.

Then think of the information that is exclusive to new external hires. This can include additional cultural integration, team-building activities, etc., and other information. Ask for pain points from recent external new hires to get the skinny on all the things they wish they had been told.

After you have that, ask an internal new hire the same questions. Once you get to this level, it is going to narrow down to more role-based specifics, but ask the questions to make sure. You may find that this is a great reinforcement opportunity for things like safety and compliance and yes, that should be different from the safety and compliance training for the really new people!

Where do I start?

You will leave analysis with a long list of deliverables. Now you decide where to start.

My advice? Look for deliverables that meet the following parameters:

- Immediate needs
- Business priorities
- Bang for your buck

The reality of it is these programs are typically large-scale and could have lots of deliverables that require a phased approach to development and frankly, funding. To maintain buy-in from leadership who WILL start to get impatient before analysis is even over, you need to have something great to show for your first phase of development, so select carefully.

If you can find deliverables that meet all three of those things—even better! You are most likely going to be building this plane while you are flying it, so watch out for items that require prerequisite information or new staff training (like mentors or onboarding buddies) and support. You can't decide to roll out the mentor piece unless you get all the mentor ducks in a row.

Journey mapping

Did you know that 91% of employees want personalized, relevant training? (Lorman, 2021)

Your program is developed and ready to really run from start to finish. So how do you make all these deliverables work?

Think about it like this: You are a manager and you have a new person starting in a couple of weeks. You now have a "menu" of training options for them depending on what you think their needs are going to be. There are going to be requirements for the different types of hires, so you have to plan accordingly. This plan is a draft learning journey. Once your newbie starts, there are a couple of ways to approach it.

Internal hires. Confidence or competency surveys are very useful and way less intimidating than "assessments" or other forms of tests for new people. Imagine being a new person in a new place and now they want to TEST you. Not sure that makes the impression you want to make.

Example: You probably have a system that is utilized within the company. Your specific department or roles use it differently, but everyone in the company uses it. Really new people need to know all the things; an internal hire doesn't. They probably know the navigation in the system and basics that totally new people will not necessarily know.

You could create a simple Likert survey and have someone complete it before they start or within the first day or so. Once you review it, you sit down with the new hire—now in the role of learner—and talk to them about their answers and the draft journey map.

Self-report surveys are often answered in two very different ways. You have people who are overconfident or suffer from the Dunning-Kruger effect and will answer that way. Then you have the people who downgrade themselves because they want to appear to overperform, or they have imposter syndrome. There are literally a billion books and articles about these things, but your awareness that these things happen on self-report surveys is enough.

The conversations you have with these learners will be different every time, but you can use questions and coaching tactics to encourage training in areas of need. Err on the side of caution. If you think someone needs training as reinforcement or a refresher, keep it on the journey map. You can always reassess later.

External hires. You can do surveys with them as well, but they should be more generic. You are going to scare off your new person if you ask them a bunch of questions about internal systems or tasks. Can you ask them about email software? Word? Excel? Sure! But if they say they need training for things like that, you need to be prepared to provide it! Analysis <a-hem> will tell you if this is a common issue with new hires and needs to be addressed.

A more realistic way to handle this type of hire is a conversation. Show them the map, and talk to them about what you have selected and why. You may find out that they have used software you use in the past and may not need to start at the beginning. But you don't know if you don't have the conversation.

Think past the first day, first week, first month

Did you know that "career reasons" are the top reason employees leave jobs? (Work Institute, 2022)

You do not want to do all of this only to have someone quit in a year. So show them what the first week looks like, the first month, the first year, and beyond. Don't just show them you value them today. Show them you plan to value them for a long time to come.

MENTORS/ONBOARDING BUDDIES

You've Got a Friend

June 8, 2023

Remember back when I said I had never experienced a formal onboarding? It's true! No formal anything beyond what I would categorize as "orientation," which focused on paperwork. However, the one thing most of them did do was provide me an experienced peer to observe and question.

Did you know that 47% of organizations currently use this as an onboarding approach? (Techjury, 2023)

What does it look like? Are they mentors? Are they buddies? Are they peer partners? Call 'em whatever you want.

What I have seen when working with customers on this is that if they already have a mentorship program somewhere in their organization, calling the people who support onboarding "mentors" can get confusing. I have seen companies call them onboarding buddies, just buddies, peer coaches, etc.

Remember fun? It was mentioned in the first article and will come again later—but why not come up with something unique? What is your culture? Does your company have a mascot? Play on words. Just because you are "formalizing" the role by giving it a name doesn't mean it can't be a fun name.

Formal/informal

When I think of a formal program I am thinking about metrics, processes, calendars, consistent activities, etc. When I think of informal, I am thinking about sitting a newbie down in the guest chair next to a harried staffer who has been "voluntold" to "work with the new person." And to be fair, there are probably some out there that are somewhere in-between.

For those who are doing this informally and it seems to be working, why not support those claims of success with metrics? Start with the expected outcomes—what do the newbies need to know and when do they need to be proficient? Gosh—if there was only a way to gather the detailed information that would indicate success? Oh yeah! *Analysis can reveal those. <WINK, WINK>*

Break these outcomes down to weekly goals for the first month and then spread it out a little bit, maybe monthly. You will quickly see where gaps are for the new hire that may need to be supported by a more formal learning event, or allow the mentor or buddy to spot areas of support they need to provide.

One of my favorite things to do is create a list of discussion points or observations for newbies and their buddies to work through together that is scheduled to take place a few days AFTER a formal training event like a required eLearning or even an ILT/VILT course.

It not only provides reinforcement for what was learned but also allows your new hire to ask questions they may not have wanted to ask while in class or were unable to ask in an eLearning. We often couple this with job-shadowing activities and reverse shadowing (where the mentor or buddy observes the newbie) activities as well.

Pro tip: Give the newbie a checklist or "observation worksheet" or something they can use when job shadowing that has them watch for specific items as their buddy works. It gives them responsibility for their learning and makes them an active participant. Do the same for the buddy when they are the one doing the observing.

Don’t forget the mentors/buddies

This type of approach is really two-fold. There are two “audiences” here. The newbie and the mentor/buddy. They have different needs and they have different objectives.

Not everyone can teach. There. I said it. It is just true. Fight me!

Just because someone is a SME, someone wants to be the mentor, or you want to assign someone to do it—is not the way to do it.

First, the people who participate as mentors or buddies should be able to volunteer. It lets you know who WANTS to do it. It then becomes “why” do they want to do it? The salty personality who is seeking some sort of power or has the “it’s my way or the highway” attitude is not the one. The person who wants to do it because they want to help someone be successful is the one.

You basically have to interview them to find out the motivation and use your gut. Do they have patience? Empathy? Can they give honest feedback, even when it is not positive? Are they critical thinkers who know how to find resources and network? Are they a good listener?

Once you have them, you need to provide some training. I know—leave it to a training vendor-type to say you need training—but in all seriousness, they at the very least need guidance on what is expected and what the outcomes are for these new people.

Pro tip: We often build playbooks that include the information they need to be great mentors or buddies. These playbooks include foundational info about the program itself, the expectations, and the outcomes. They also include all those activities, checklists, and discussion points in one place and matched up with the formal learning events they are based upon for convenience.

Did you know that according to research from National Mentoring Day, 67% of businesses that utilize mentoring programs in onboarding reported an increase in productivity and 55% saw a profit boost? (eLearning Industry, 2022)

The proof is in the pudding

Remember those metrics mentioned earlier? Evaluate them. Try out your new program for at least six months and then review some stats to see what is happening. Talk to the mentors, talk to the victims—I mean, newbies—to see what is happening. Does something need to be added? Does something need to be removed? What is most valuable?

I would wait to make any major changes at six months. Unless it a glaring problem, let it all ride for the next six months. This will allow for a higher comfort level of the newbies who are suddenly not new anymore and for the mentors who may be new to that role.

Can it be sooner? Sure! If you are running a program that is covering a lot of people and can provide enough data to make decisions, then go for it.

Pro tip: Pilot it with a small group first. If things seem to be going well after six months, roll it out to some more people—a different audience—and see if the results are similar. Everyone yells at me about these timelines but research is tricky and making decisions without it can result in costly changes or abject failure.

Should you incentivize mentors/buddies?

This is a point of debate. I think it would be great to provide something. These tasks usually fall under the "other duties as assigned" portion of a job description. I would change THAT for sure. If there is an expectation that employees at some time may be called upon to act in this capacity, they need to know it up front.

And then pay them for it. Whether it is money, company incentive plans, or a stipend of some kind, it doesn't matter. But acknowledge it with more than a pizza party.

VARIETY

Variety Is the Spice of Life

May 23, 2023

Jeremy is a new hire at Company X. He is going to be working at a call center, a job he has done before but not for this particular company. He is excited about the new opportunity. This company seems to be interested in career progression and he feels like it may be a place he could work long term.

He arrives for his first day of work where he encounters 15 other people hired at the same time as he was hired. They are greeted by an HR representative who escorts them to a classroom, hands them a stack of documents to review and sign, puts a PowerPoint on the screen, and tells them this room is where they will report for the first three weeks of employment for onboarding.

Jeremy asks if any of that training time includes time in the call center. The HR rep lights up and tells him they will get a tour next week and after three weeks, they will get to listen in on live calls.

Jeremy thanks her but hears his internal voice telling him this might not be the right company for him—three weeks before they are even exposed to the actual job? When he arrives home, he *tells his spouse about his disappointing first day. The spouse tells him to stick it out and see what the first week is like.*

At the end of the week, after 6 to 7 hours of PowerPoint presentations for five days straight, Jeremy goes home, cracks a beer, and starts looking for another job.

What could Company X do better?

One chance to make a first impression

You can have the best hiring and recruiting programs in the business and still blow the retention of employees because of a bad onboarding experience.

Did you know that nearly 1 in 5 new hires quits within their first week and 17% leave after the first month? (BambooHR, 2023)

Jeremy's experience above is one example; another is the "orientation day". And that is it. One day mostly focused on paperwork for HR. Day 2 on the job is just "on the job".

How about that first impression? We can do better and here's how we do it.

Send a preboarding welcome message, maybe some company swag? Make sure someone from their work group is there to greet them on their first day. Paperwork will be there and can usually wait a little bit.

Take them on a tour, introduce them to some people. Then sit your newbie down with HR to do some paperwork for an hour or so. Maybe there is a compliance eLearning they need to have on Day 1? Knock that out. Schedule a departmental meet-and-greet over lunch. Let them spend a couple of hours job shadowing and just getting a feel for the workplace.

A variety of activities keeps your new hire engaged. The variety also gives you a chance to offer them unique experiences that can only be found in YOUR organization. One mistake I commonly see when working with onboarding is going too corporate. I will write more about fun later but for now, just think about the things that make your organization unique and use them to put some spark in what can often be a mundane experience.

Let's look at some ways you can spice up the onboarding experience beyond the first impression.

Informal learning in a formal process

When you hear the term "informal learning" you may jump to peer-to-peer learning or job shadowing. I encourage you to expand upon those and think about things like Instagram Reels and TikTok. I am not necessarily saying use these apps...I am saying embrace the idea of them.

We have been talking about content chunking, etc. for years—think microlearning. The approach these apps take to the short bites of information is not new for learning but the style—unscripted, quick, relevant information that can be replicated *right now*—is compelling.

One of the coolest practices out there is letting existing employees create content. They are probably already creating social media content in their off time—videos of cats, taking pictures of their food, etc. Why not harness some of that production talent on the clock as well?

Strap a Go-Pro camera on line workers so they can show how to properly make or build something. Make it a contest at work! Ask employees to record themselves performing a task—per the company process—and have employees vote or select the best one to use in training or to put in a content repository of on-demand, task-focused materials.

Does someone need to curate the materials? Verify it follows company processes safely? Absolutely. But instead of spending three months in video production, you could conceivably spend an afternoon.

And once a person has seen it in onboarding, the repository makes it available on-demand for reinforcement and remediation.

The trick to variety is to take all the pieces and put them together in a meaningful way for each learner.

Insert these informal items into a formalized onboarding program, curriculum maps, and journey maps.

A picture is worth 1,000 words

Did you know that 87% of respondents in a survey by Kaltura indicated that video helps train employees at a faster rate? (Kaltura, 2017)

Use video, pictures, graphics, and other visually appealing options to grab attention. For onboarding, I like to recommend a "hype" video. Spend a little cash making a high-end production video for your company. Use it in hiring, recruiting, and onboarding.

Email it to a new hire about a week before they start to welcome them to the company. Why not show them your culture instead of just telling them about it?

Videos offer several benefits to onboarding:

1. **Training consistency**. Even the best-designed facilitator guides do not guarantee a consistent message in virtual or in-person classes. Facilitators should be telling the same stories and referring to the same information for every class, but we all know that sometimes doesn't happen.

2. **Reinforcement opportunities**. In all the excitement of a new job and new responsibilities, it might be difficult for some learners to really retain training information. Videos allow them to revisit the video on-demand when they think they need it.

3. **Engagement**. If you have a remote workforce, a hybrid workforce, or a workforce that is spread out all over the globe, video offers you a way to bring all those people together. This plays into consistency but it also plays into the welcoming culture you are hopefully trying to convey.

4. **Cost**. Videos, especially when produced informally, can cost little more than time to produce and provide to employees.

As mentioned above, short, quick videos are great for demonstrating a specific task or concept. Have something short you want to emphasize? Instead of burying it inside of an eLearning or waiting for a class time to share it, make it a stand-alone video deliverable that can be accessed whenever it is needed.

eLearning

Need something a little longer, but still want to keep it chunked and on-demand? eLearning is a great option. There are a ton of talented developers out there that can make the current authoring tools bend to their creative demands.

I encourage you to also think about flipped classroom methodologies for onboarding. Use eLearning to deliver foundational knowledge like timelines and vocabulary to learners a few days before they attend a hands-on classroom session. Not only does it keep you from spending valuable classroom time on basics, it offers a chance to reinforce what was learned in the eLearning through actual use of the information.

These modules are also great for teaching software processes and if you create them for onboarding and chunk them up effectively, they can also serve as on-demand reinforcement you can use for everyone.

No, the written word is not dead

There is absolutely nothing wrong with Quick Reference Guides (QRGs) and other job aids in a written document. The thing to remember about these types of tools is to keep them brief.

For a new hire, job aids, checklists, and anything that can assist them is usually viewed as helpful. Writing an entire manual will not serve your learners well. The idea is to break out the most commonly missed items or most difficult things and make aids to assist people on-demand.

For example: You have an eLearning module that shows learners a process and even lets them practice it through a simulation. However, when learners get back to their job, they are not quite sure what Step 3 was. A quick checklist or cheat sheet they can pull up and refer to is a great tool.

Want to save some development time? Ask this question: Does this task really need a course? I know—I am a vendor—what am I doing? Well, I am here to tell you that a training module is not always the answer. And if you come to me for recommendations, I am going to ask you that question. And I am going to be 100 percent honest with you if I think a module is not necessary.

Activities

Onboarding is not just about ramping someone up for a new role. It should also be about developing a relationship with your new hires. Here are some of my favorites:

Virtual tours. If your new hires are required to report in-person or are hybrid, create a virtual tour of the offices or location where they will be working. You can use an informational video or even create a quick module using 360-degree images with hotspots. You can create a game out of it—like a quest. Have them “collect” things around the office. Send this to them as part of an onboarding welcome package so they know where to go the first day and have some level of familiarity with their new work digs.

Coffee talks. This is great for employees reporting virtually, hybrid, or in-person. On their first day of work, schedule coffee talks with immediate supervisors, managers, and anyone providing support during onboarding, mentors, etc. Keep them to a half an hour and reserve the time specifically for the “get to know you” conversations.

Lunch dates. If you have a new hire that is going to be interacting with different work groups or departments in your company, there may be too many individuals to meet. So why not schedule a lunch with the marketing department? Or finance? This can work in any of the work situations. Make it mandatory for existing people so they don't try to avoid it. I would also recommend that you don't pile up a lot of these in the first week. Maybe one a week for the first few weeks, in order of importance to the newbie's role.

Mentors/buddies/onboarding coordinators. Whatever you want to call them doesn't matter. We will get into this deeper in a later article but providing a new hire with a specific contact is a great way to provide some variety to the process. You can develop activities around this interaction that can ramp a new person up for productivity and provide them with a personal connection right out of the gate.

Job shadowing. Nothing acclimates a newbie like watching a pro in action. Don't wait to introduce new people to the job they were hired to do. This also builds team rapport and fosters relationships.

Work tasks. Yes. Provide some training and then let new people do some actual work. Make performance metrics that are specific to new employees and have them complete newly trained work tasks between formal training events. Let them try their new skills, even if it is under the supervision of a training staffer or mentor. Keep the tasks appropriate to their level of skill. Some people are quick learners. Don't let them get bored.

The important part of this one? *Track performance.*

Did you know that 33% of organizations agree that reducing time to proficiency is an onboarding goal, but only 7% measure it? (Kronos, 2017)

Do not give people busy work, conduct an analysis (*a-hem*) to find out what the right metrics are, provide them to your new employee, and then let them work.

Prepare, prepare, prepare

A great onboarding experience cannot be done on-the-fly. Create an itinerary for a new hire's first day and then also for their first week. Send it to them in advance. Show them you are invested in their role at your company. Does this require some attention and thought? You bet it does.

It is easy to hire someone and either "orient" them in a day or even sit them in a training room for a few weeks, but the results are probably going to be similar. This is where the variety of modularized materials comes into play. Each learner could have unique needs, so plan before they arrive and then sit down with them and review the plan, get their input, and adjust.

Offering an experience with variety requires preparation and planning. This is just a brief peek at different methodologies and activities that can make your organization's onboarding experience something unique. Don't be afraid to be bold and creative.

> "A great onboarding experience cannot be done on-the-fly."

REINFORCEMENT

Onboarding: It Takes as Long as it Takes

July 13, 2023

I hear you. You want to know how long onboarding should take.

Up to this point in this series, we have discussed why analysis is important in the development of an onboarding program, how to get buy-in from leaders, how a variety of activities engages learners, the value of mentors, and the imperativeness of collecting metrics.

In this piece, we are going to discuss how long an onboarding experience should last or better yet: When does it transition from onboarding to everboarding?

Did you know that 3 out of 4 HR departments that intend to hire in 2023 anticipate growth within HR and are focusing on the employment "experiences" that keep employees happy, healthy, and engaged? (Aberdeen Research, 2023)

This, coupled with all the data out there about new hire retention, makes onboarding a key aspect of that focus.

So, how long?

Well. It depends. Everyone's favorite answer, I know. If it was one-size-fits-all, I would not be writing this, we would all apply the formula, and move on to the next thing on our lists. The best way to determine how long onboarding should be and when it should transition to something else is, well, analysis. You might think you know, but you should verify and confirm things you think you know. Instead of making educated guesses—make educated decisions.

I am going to throw a little wrench in here. Is everyone you hire for a new position from outside your organization? Are they all full-time? Are some part-time? Are they remote? Designing a standardized onboarding program that can meet the needs of all these potential audiences is possible. But you have to ask the questions to meet the needs.

Preboarding

The new hire experience does not start on the first day of work. I am not talking about work tasks or benefits or computers or badges. I am talking about the hype.

This actually should be part of recruiting and hiring—but that is a different article. So here, after the offer has been accepted, what are you doing to make that new person feel welcome? Excited they chose your company? Less anxious about the "first day"?

First, create a hype video about your company and send it out after job acceptance. When my son was accepted to university, they sent him a congratulations card that played the fight song. As an alum it made me very happy, but it also was a great hype piece. Do you have any swag? Metal water bottles with your logo?

Have the managers of different departments create welcome videos. While it would be great for each person to get a personal video, I know logistically that could be difficult. This doesn't have to be a high-end video like your hype video (spend your money there). Make this something completely informal. Think TikTok. Something that just says, "Hey, we are super excited to have you." Have a remote team? Get everyone on a video meeting and record a quick group welcome.

The new hire's direct supervisor and/or manager should reach out in advance as well, just to say "hi" and "welcome." If you have onboarding mentors, coordinators, etc., they should be included as well.

Time the release of these things so it is not a one-and-done thing. Send the welcome videos a week before they start.

A couple of days before they start, send an itinerary for their first day. Include:

- **Where they report:** Address, parking lot info, links for remote people
- **When do they report**: Date, time, time zone
- **Who they report to**: Name, title
- **What they can expect**: Fill Day 1 with lots of things, but not too many (see below)
- **What they need to bring**: If there are any items they are expected to have on Day 1, include it here as well

Day 1

Make sure there is someone from HR and the new hire's work group available to greet them on their first day. Assign an onboarding buddy/coordinator/mentor and make that person the one who accompanies HR. It would be a bonus if either one of these people were someone they had met during the hiring process or saw on their welcome video—nothing is more welcoming than a familiar face!

Now. Think about learner needs—what does this person need to know and do on the first day? We are not talking about what would be convenient for HR or anyone else. What MUST be done Day 1? Put those things on the itinerary but break them up with other things like tours, 1:1s, a team lunch, coffee talk, and even a little down time to just explore a bit.

Before that newbie leaves the first day, they should have an itinerary for the rest of the week.

Week 1

This is where you sprinkle in all the other stuff that newbies need to do, but don't have to be completed when they walk in the door Day 1. Again, spread them out. Add in some training items. Are there safety or compliance items that your newbie needs before they access certain information or areas? Get those taken care of.

Job shadowing and observations are an excellent use of time the first week. Let them observe more experienced people and even have them interact with some of the most recent hires so they can learn from one another. If you have the capacity to use cohorts, they are a great chance for new people to make social connections and feel connected.

Before the first week is done, your newbie should have a clear picture of what the next month, two months, or three months look like. There should be training plans, work plans, performance metrics and expectations, and immersion in company culture.

If your company touts "people first," onboarding is a great opportunity to make that real. Managers and supervisors should be major players in the onboarding experience. They should share how the culture of the organization drives their decision-making and let the new hire watch it happen.

They should also have a clear picture of where they can go and what they can accomplish in a career with your company. I know what you are thinking: "But they just got here! We haven't even trained them for this job, much less advancement." That is 100 percent true.

Did you know that employees who strongly agree they have a clear plan for their professional development are 3.5 times more likely to strongly agree that their onboarding process was exceptional? (Gallup, 2019)

However, if you are not hiring with the intent to retain and grow your people, you are not going to retain them.

Look for the transitions

Professional development doesn't end after a week or a month. Once the "new" is gone, the goal then becomes support and advancement. The transition from new employee to advancing employee may be very subtle, but not so hard to spot. Once an employee starts to complete training that allows them to upskill to the next step in a career progression, they have entered the realm of **everboarding**.

Another transition is when those advancing employees start a new, more advanced position. They should then be **reboarding**. Does this mean rolling them all the way back to company history and culture info? Not necessarily. Is that information different for someone in a more advanced position? Has it been a minute since they started fresh with the company? Has something changed? Your decision.

If employees are transitioning to a leadership position from an individual contributor position, there will be leadership topics and training, etc., that will serve as the reboarding experience.

If an employee and their manager have worked well together planning career progressions, it will create a continuous learning environment and will drive retention.

> Professional development doesn't end after a week or a month.

METRICS AND BENCHMARKS

Metrics + Milestones = Onboarding Success

June 15, 2023

Did you know that 60% of companies indicate that they do not set any milestones or concrete goals for new hires to attain? (*Harvard Business Review*, 2018)

Read that again.

That is a big number—60%. That is a lot of programs out there that cannot tell stakeholders, learners, or L&D if the learners are successful or if the whole initiative is successful.

Wait—let me get my other soap box. I have one for analysis, as you well know. But, I also have one for metrics and evaluation.

<SOAP BOX #2 RETRIEVED; STEPS UP CAREFULLY>

It is basically this: Why go to the expense of designing, developing, and implementing a training initiative and not collecting data that demonstrates success (or failure)? Or that the people utilizing the program are successful? Especially for a program-level initiative like onboarding?

This is a program gap that I see often—and I get it! Evaluation can be a pain. Most people have so much to do and are moving on to the next thing so fast that follow-up just doesn't happen.

I have some thoughts on how to make this less of a chore and I will share them here. And for the 60% out there NOT collecting metrics, it's not too late. Keep reading. I have some ideas for you, too.

But first, let's talk about why metrics are so important.

Everyone likes a win

Albert Bandura, a psychologist, learning theorist, and philosopher, coined the term "self-efficacy" in 1977. It is basically a person's belief in their ability to be successful in certain situations. The power of positive thinking.

People like to feel good, and wins feel good. It motivates them to keep going. It makes me think of video games and gamification in general—complete a quest successfully and you get to level-up and get your character new goodies.

It is the same for people learning new work tasks. According to the HBR article referenced above, setting achievable goals can provide new hires with a sense of satisfaction and the added benefit of a clearer picture of the task they completed.

So, how can you give new hires the wins they crave?

Start at the end

When conducting the analysis for your onboarding program (a-hem), start with the outcomes in mind. What are the business goals? What do new hires need to know and do? When do they need to know it and do it? What is expected after the first week? After two weeks? A month? Six weeks? You get the picture. When is a person considered "ramped-up" to a position and performing tasks on their own?

These are your metrics.

You are looking for the point where expectations for a new hire meet the performance metrics of an established employee. Where is the line?

Onboarding participants need their own metrics

Asking a new hire to meet the same metrics as an established employee is not realistic. New hires need their own set of metrics, a clear picture of what those metrics are, and how to achieve them.

There is another audience to think about here as well. Mentors or peer-buddies—those people assisting in onboarding new people—also need their own metrics.

These people are being pulled from their day jobs to assist a new person. If they are working toward performance metrics—especially those that impact their paychecks—that rely on them working towards those metrics 100% of the time, they are not going to provide a good onboarding experience.

So, plan for and write realistic metrics for new hires, and plan for and write adjusted metrics for those who are assisting newbies.

Did you know that employee onboarding statistics reveal that 77% of new hires who accomplish their first performance milestone were put through formal onboarding training? (LinkedIn, 2017)

Additionally, 49% of those who fail to meet their first milestones had no formal onboarding training at all. Again, some big numbers.

No metrics? No worries

If you have a program in place and didn't think about this, change it.

But before you do, talk to the people who have been onboarded and their supervisors. Just as you would have in an analysis (a-hem), you need to find out what is realistic and what isn't.

Think about it: If you have a program that has been running for a little bit, you can talk to the people who have participated and ask them about the experience and what metrics would have motivated them. Ask the supervisors what metrics are important and when. Look at real-life metrics of these people to see what's attainable.

One and done? Nope

To go along with the tip above, for those just starting out, it is important to note that the metrics you set may need to be adjusted. Programs should evolve as needs and goals change.

All sorts of things look great on paper—they are absolutely fabulous when running in an LMS! Alas, even pretty things can have stinky stats. I recommend you run your program for a few months, check the stats, and see what you are getting. You may find that the metrics are set too high or even too low. They may be timed incorrectly.

Collect the data. Analyze it. Develop an action plan, but don't rush into making changes. If you have only had 10 people run through a program or even an individual course, that is probably not enough data to drive a change unless it is something really major, so weigh the cost of making the change now versus later. If it is not time, take note, run it for another few months, and check again to see if the new data validates what was observed before. THEN change it.

So many stats, so little time

What data should you gather? That depends. Every instructional designer's favorite answer. I am going to conjure Kirkpatrick's for this one. Dr. Donald Kirkpatrick is credited with creating his evaluation model in the 1950s:

- Level 1: Reaction: Did the learner enjoy the training? ("Smile sheets")
- Level 2: Learning: Did learning happen?
- Level 3: Behavior: Are learners successfully applying what they learned?

- Level 4: Results: Did the training help learners help the business meet its overall goals?

These statistics are different, they are gathered at mostly different times, and they measure very different things.

The one we see most often, as learners and developers, is Level 1. It is usually a survey link or a paper-based survey given at the end of a training course and usually required in order to receive a completion certificate. They generally ask learners if they liked the training and whether they think it was relevant.

I like to mix some Level 2 in with my Level 1 questions. These usually invoke self-efficacy and are interwoven with the learning objectives. For example:

Learning objective: Demonstrate the steps for Process X.

Survey question: I feel confident performing Process X (usually answerable using a Likert scale).

Level 3 is about behavior change and it is often skipped. Is the learner using what they learned to perform their job successfully? If you ask the learner, they are probably going to tell you yes. That is why I recommend this level is taken to their immediate supervisor. If the expectation is that the learner is going to leave the learning event and start performing this task—and they should—then develop a survey for their supervisor to complete 30 days after the training takes place.

See where it starts getting tricky? Supervisors are busy, L&D is busy. Who has time to follow-up? That is why planning is key.

Level 4. What can you say about Level 4 other than there is not much of this level going on out in the field. This is where you decide if the program is meeting business goals. The high-level, lofty stuff. If the goal of an onboarding program is to retain 80% of new hires after one year, you can count heads to see who is still around. But you have to count the heads.

Level 5. What? Oh, I didn't mention that one up top? Well, this one is relatively new and it directly ties to return on investment (ROI) and return on expectations (ROE). If your onboarding goals are not directly tied to overarching business goals, you are pretty much dead in the water on this one. You can probably reverse engineer some stats to support some initiatives but you are going to have a lot of trouble finding hard data. That's why you have to plan for it from the start.

As we have talked about before, onboarding initiatives can be an expensive endeavor. If you want to develop a really successful program, you are going to need metrics. At the beginning, in the middle, and at the end.

> "You are going to need metrics. At the beginning, in the middle, and at the end."

BUY-IN AND SUPPORT

From Darkness to Light: Securing Buy-in for Your Onboarding Dream

May 10, 2023

We all know when it comes to talking to executives, they usually want very few details: How much will it cost? How long will it take? This is especially true when it comes to training, which unfortunately is still used as a reactive measure instead of a preventative measure.

A well-planned and executed onboarding experience is a preventative measure:

- Improves retention (Brandon Hall for Glassdoor, 2015)
- Improves employee satisfaction (Axonify, 2018)
- Improves new hire productivity (Brandon Hall for Glassdoor, 2015)

So, how do you approach leadership about this type of a training initiative? How do you get their buy-in?

Put on your sales hat

A little Sales 101 never hurts because if you want to gain buy-in for a potentially expensive and long-term program, you are going to have to devise the pitch and then deliver it.

Be prepared to:

- Address pain points
- Describe how your proposed solution can assist with those pain points
- Explain why this should be a priority
- Illustrate how you and your team can make the process as easy as possible

Let's dig in a little.

Plan, plan, plan

One of the first things I was ever taught about talking to management about gaining buy-in: *Never approach a leader with a problem for which you don't have a solution.*

If you want to pitch a program, do the research, devise a plan, and have the receipts. When I refer to "receipts" I am talking about the facts and figures that support your pitch. And don't just pull some stats and throw around the numbers. Read the information around the statistics so you can explain it well and make sure you can actually use it. If you can't explain it, you don't understand it.

For a pitch like this, you need to use the facts and figures in a couple of ways to support your view.

Don't be afraid to go dark...

Because most L&D efforts are considered cost centers instead of revenue centers, you are going to have to flip the script to get some support for a new, large-scale onboarding program. You are going to be able to use facts and figures, you just have to talk about them a little differently.

For example, instead of presenting a statistic like this:

Great employee onboarding can improve employee retention by 82%.

You are going to have to dig up something more ominous like this:

The Society for Human Resource Management (SHRM) reported that on average it costs a company 6-9 months of an employee's salary to replace them. So, for an employee who makes 60k annually, that comes out to 30k-45k in recruiting and training costs.

Am I cherry-picking data? You bet I am. But that is just where I start. Take that piece of statistical information and make it more applicable to your organization. Find an example within your company of an employee who was brought on but did not stay past the first year. Find their salary and do the math. Find 5. Find 10. Present THAT to your boss.

Sometimes it takes the dark stuff to create a really clear picture of what is happening. Even if you don't collect metrics on employee retention, you can work backwards to find what you need.

Remember, you are pitching an idea. We use dramatic data to hook learners into the "what's in it for me" aspect of learning, so use your skills here as well.

...To lead them to the light

Once you have painted the dystopian hellscape that are the real ramifications of bad or missing onboarding experiences, it is time to give them a glimpse of an onboarding utopia with a solution.

We have already talked about receipts. Now it is time for statistics like the ones up top. All the great things that others have experienced through well-planned and executed programs.

But there are other things you can present besides statistics.

Reality checks

Find case studies of successful onboarding programs to share. Does a competitor do it better? Use it. Is there a company that your stakeholders really admire or want to emulate? Find out what they're doing and use it to sell your ideas.

Costs are also part of the reality check. At some point in your buy-in conversations, someone is going to ask about money. Depending on the size of your organization and what you want to achieve with your onboarding program, this number fluctuates wildly. At this stage ballpark it—do some research, talk to some vendors, talk to colleagues, call some of those case study folks and ask them. Tell them what you are trying to do, and they are most likely going to help you. L&D solidarity!

Big numbers are ok. You want the shock value. You are going to use it to negotiate your project.

Picture it—you are in a meeting with leadership, you have taken them through the hellscape, you have shown them what the other side looks like, and now they WANT it. And someone asks: How much?

You ballpark some figures and heads start shaking. But you are ready with a counter.

"What if I can get a more exact number?," you ask. Eyebrows raise and someone asks: "How?"

And you say…I know you know this one: "We can conduct a needs analysis for a fraction of that and know definitively what we need, which will nail down costs."

Yes, I snuck out my soap box for this. When you need to know what you need to know, analysis is the answer. And you can do an analysis at a relatively low cost compared to just jumping into development. This number is far more palatable to people who count the cash.

You know what else it does? It gets the ball rolling. But even better? Now, there is an investment, even if it is small, in getting this thing off the ground.

> Never approach a leader with a problem for which you don't have a solution.

FUN

We All Just Want to Have Fun

July 20, 2023

There is absolutely nothing wrong with adding some fun to training programs!

Is there a time and place? Of course. You know how you find out where to appropriately add some fun? *ANALYSIS*. This was my last chance—I had to reinforce it one more time.

Did you know that 71% of employees feel stressed out during the workday? (APA, 2021)

Let's face it—it is pretty stressful away from the office as well. So, why not keep training a little lighter when we can?

Onboarding is the perfect opportunity to introduce fun as part of your company culture and demonstrate it to your new people.

Reality check: Maslow's applies to adults too

Abraham Maslow, a psychologist, wrote about "The Theory of Motivation" in 1943. It is often called upon when folks talk about educating children. For example: Kids who are hungry cannot learn effectively, so we offer to feed them breakfast at school so they are ready to learn.

Look, I know how I get when I am hungry—I am not interested in learning anything either. So, take this very basic idea, remember how you acted the last time you needed a snack, and keep reading.

Maslow's theory is basically five layers of human needs. There are a million images on the web, but here is one for your convenience.

The theory is you work your way up from the bottom of the hierarchical triangle—as you meet each one, you can move up to the next one and ultimately reach self-actualization or your personal pinnacle of success.

The bottom of the triangle is literally air, water, food, and shelter. That's fair. Remember the kids and food reference above? Humans need these basic needs in place in order to move up the triangle.

How does fun apply here? It is about motivation. If I don't know where my next meal is coming from or where I am going to sleep tonight, I am not motivated to learn. Unfortunately, some of your potential learners could be facing these things outside of the workplace. It is going to take more time to engage them and motivate them to learn. Getting themselves moved up the triangle is probably why they took the job you are about to onboard them to fill!

This is not meant to be flippant in any way. These are real concerns for a lot of people in the workforce. Employees with these struggles are showing up for work because they must and I know I want them to be successful and I am going to do whatever I can to make that possible.

Did you know that 90% of employees place an emphasis on training that is "engaging and fun"? (Axonify, 2018)

They want it. We want to build it. So, what does fun look like in training? There are lots of options, but here are a few opportunities you have.

What makes your organization special?

Does your organization have a mascot? Can your company laugh at itself? Are there puns? Use it all to increase engagement. Drop all the buttoned-up formality and embrace the HUMAN side of your business. This is why onboarding is such a great opportunity for fun.

There will be plenty of tasks that require a more serious approach in training later. Right now, you want to show your new people "what's in it for me" and confirm they made the right decision in choosing to work for your company. So, hype it up.

Socialization ideas

Onboarding Kits. Company swag. Maps. Fun FAQs (compiled from the current workforce). Key links they might need. Day one itinerary. What this looks like at your organization is up to you. Whether you send it to a new person in advance or have it for them the first day? Your decision!

Build a Bingo Card. Are there a whole bunch of different people your new folks need to meet? Make a Bingo card of their names and give the newbie the freedom to arrange meet-and-greets with them. Give them a deadline. This is incredibly versatile. Have too many people? Make it departments or work groups instead. The key to success? Make sure all the people on the card are aware of this exercise and put accountability in place so they participate.

"Baseball" Cards. This is a twist on the idea above. Make a digital "baseball" card for each person your newbie needs to prioritize for contact. Give then the power to then "collect" the cards. What do the cards contain? Name, title, contact info, a FUN fact, major projects, their role, etc. Make them digital or make them actual physical cards—whatever works. Provide your new employee with a way to organize the cards and turn them loose.

Scavenger Hunts. Are there key locations your new people need to know about? These can be physical, intranet, internet, etc. Send your new folks out to find specific things in those various places.

Gamification

Remember a few posts back when we talked about the onboarding journey? I always envision onboarding as a game board or a quest. We often talk about gamification in eLearning, but I encourage you to expand beyond that. How can you "gamify" the entire experience? And carry it through their career?

As we have discussed in those journeys, onboarding is not a one-day or even one-week event. We should instead be looking at the individual learner's experience during onboarding and beyond. We should be reboarding them as they advance, which then translates to an everboarding experience. Whether it is their first day or their 3,000th day—your employees always know where they are in their journey and are always working their way up the path to their next achievements.

Embrace informality

Did you know that 92% of employees say that the right kind of formal workplace training impacts their job engagement positively? (Axonify, 2018)

I know. You are looking at that subhead and that statistic and scratching your head. Develop a formal overarching program that has metrics and benchmarking that allows for the space to be informal.

TikTok Style. Not everything has to be highly produced, cost a bunch of money, or take a long time. Quick informative videos can be used very well as reinforcement materials. They are also great way to quickly add things to existing materials. Say you have an eLearning that has been developed for onboarding about a particular system in use in your organization. Nothing ever changes once a system is in place, right? Wrong. We all know it. Somewhere, sometime, someone is going to find a nugget that needs to be shared. So instead of waiting several weeks for a full-scale production, pick up a phone and get the info out there.

Shadowing. Job shadowing is a great way to introduce new people to their new roles. Again, this appears to be informal but when you put some checklists, talking points, and structure to it, it has a formal foundation that provides what you need to evaluate the program and your learner. But for them—it is a casual conversation with a co-worker.

After Hours. Does your team get together for social gatherings after work? Be sure you include the new hire. Keep attendance optional though—not everyone likes the same thing.

Keep the first week light and entertaining

Does it really make sense for the new person to be in the office by 8 a.m. on a Monday morning? Is anyone ever really ready to go at 8 a.m. on Monday? Why not tell them to report at 9 or 10 a.m.? That lets all the folks internally get their ducks in a row and communicate. This allows some time for troubleshooting—or making substitutions if someone is out sick.

Maybe the first day isn't even a Monday? What if it was Wednesday or Thursday instead? This gives your new person a couple of days in the office and then a break to process all the new exciting things you have in store for them.

Choose entertaining, engaging, and fun activities for learning. All of the activities should flow well. Just because it is time for a piece of training doesn't mean you drop the creativity and fun. Remember all the culture and personality? It should carry over into the training materials and events that need to be completed during onboarding. Are some of those topics serious? Of course. Do you need your new people to engage in and actually absorb safety training? Absolutely. Roll your culture and personality into those "serious" topics as well.

> "There is absolutely nothing wrong with adding some fun to training programs!"

CLARITY

Don’t Keep New Hires in the Dark

June 21, 2023

Think back to a time when you took an essay test. You attended class, you read materials, and you prepared for the test. Test day comes and you NAIL IT. You feel good about your answers—you think about the few little things you messed up in formatting—but who cares? It was about your knowledge of the topic—not mechanics, right?

Then you get your test back. You do not get the grade you expected. Turns out, mechanics did matter and even though you really did nail the content, the mechanics got you in the end. So, you ask to meet with the instructor and ask if the information about the mechanics was mentioned or located somewhere so you could review it.

The instructor says there is a rubric for success, but you can’t see it.

Now how do you feel?

Powerless? Unempowered? Adrift? Angry?

All valid. How are you supposed to pass the test if you don’t know how you are being graded?

Now move that to the workplace where your career, your livelihood, your kids' braces bill, and other things are directly impacted by how you are assessed on performance at work.

You can't pass the test if you don't know what the rubric looks like.

Show them the light

Your new people (and anyone else, really) should never be left in the dark about expectations. This goes for everything from job performance to career advancement in your organization.

In an earlier installment, we talked about the importance of metrics for new employees, so we will only briefly talk about that here.

You should have performance metrics for new employees. And unless the job is super intuitive or easy, the metrics for new people should be different from established people. Not only should they exist, but they should be shared with the new person as early as possible. How complex that is is up to you and your organization. But build the grading rubric and share it with them.

Did you know that one of the most motivating experiences employees can have is making progress on a meaningful task? (APA, 2021)

I went to a 90-day review once and was told I was a stellar employee, but I was being marked down on my review because I got strep throat and had to use sick time during my "probationary period." I did not know I was even in a "probationary period," I had sick time to use, and I WAS CONTAGIOUS. Oh, and I also did not know it was "frowned upon" to use sick time at all, much less in the first 90 days.

There should not be any "unspoken" expectations that can be used as gotchas.

Role clarity before they are in the role

Performance expectations for role-specific tasks should be transparent and freely accessible to everyone in the role. They should also be as fluid as possible. Not everyone is the same. Some people catch on faster than others. If your policies are not flexible, that information should really be shared at the interview phase.

If you do have flexibility, tell applicants what that looks like and how it is handled. If it is only going to be flexible during a "probationary period," they need to know that information up front.

We mentioned motivation above, but objectives and expectations are important for some other reasons as well when it comes to providing clarity to new hires:

Prioritizes tasks. Employees who know what right looks like will help them manage their time better. A lot of adult learners are self-starters. So, tell them what you expect and see what they do with it!

Encourages informal learning. New people will talk to their new co-workers to ask for tips. This also gives them a chance to work with their mentors to problem-solve and devise plans of attack.

Promotes decisiveness. Instead of guessing about what to do, they can just go do it. It will also help them identify knowledge gaps they can bring up with their mentor. This also gives them a chance to modify their learning journey.

Provides metrics. This is not just for you, but also for your newbie! It allows them to adjust and alerts you to possible training gaps. **Pro tip:** It is fine to let a new person try to self-correct but don't let it get to a frustration point. When you see something, offer support and then back off a little to see what happens.

Career clarity

New employees not only want transparency about the role they have, they also want transparency into what types of career progressions are available to them.

Did you know that 76% of employees say they are more inclined to stay with a company if it offers continuous learning and development? (SHRM, 2022)

You are not just hiring someone to hire someone (hopefully!) You are hiring the newest member of your workforce team and you are about to spend some money to get them ramped up for their job. If they are looking for a new position in six months or a year, you want them to look internally first.

Remember your different onboarding audiences? Some are internal hires; some are external hires. The onboarding need for these two types of hires is very different. The external hire will need more information and training while the internal person is already immersed in the culture and has established relationships that can strengthen your whole organization.

Imagine how empowering and welcoming it would feel to talk about a career progression during onboarding? Your new hires are thinking: "Wow! They already have confidence in me." Talk about engagement!

Reboarding

This is the term used when you onboard an internal employee who has changed positions. Do they need to be introduced to and trained on their new role? Absolutely. But that is not all. Employees who move to a new position should be welcomed just like people are brand new to the company when it comes to the hype, welcomes, swag, and all the fun stuff.

They should get a new journey map. It will look different from one you would have developed for an external hire. This one may not have all the company culture information, compliance items, and other things people new to the organization need. But hey! Maybe they need a refresher or reinforcement. This attention will reenergize their engagement.

Utilize your LMS

There is a very good chance your organization is not using its LMS to its full potential. Find out what kind of automation it features. Can you assign a learner's playlist? Can you schedule reinforcement items and refreshers for automated delivery to individual learners?

Don't know? Find out. It could come in very handy for providing onboarding clarity.

For example, if you as a manager could go in and assign modularized learning options for individual learners, you could enter a new person's entire learning journey that shows them the upskilling path to a next-level position.

Or better yet, you are a learner who is empowered from the start to work on your learning journey at your own pace. Sure, you have to get the initial training items down and learn your new position first, but imagine seeing that journey laid out for you. And imagine the upskilling information is not locked down so you can access when you want to learn the information.

YOU are in control of your destiny! THAT is clarity.

> "New employees not only want transparency about the role they have, they also want transparency into what types of career progressions are available to them."

CONCLUSION

Developing and implementing a successful onboarding program is no small task. It cannot and should not be done without careful analysis and planning. Get it right and the foundation of the program can serve your organization well for years to come. When teamed with L&D, HR initiatives like onboarding can be a powerful tool for recruitment and retention.

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Dr. Tara Roberson-Moore has more than 16 years of experience in workforce and adult education. She has led organizational learning development projects for the US Department of Transportation Pipeline and Hazardous Materials Safety Administration, Oklahoma Assistive Technology Foundation, Office of Management and Enterprise Services (State of Oklahoma), International Association of Fire Chiefs, International Fire Service Training Association, the US Department of Justice/ Office on Violence Against Women, as well as a variety of industry clients.

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